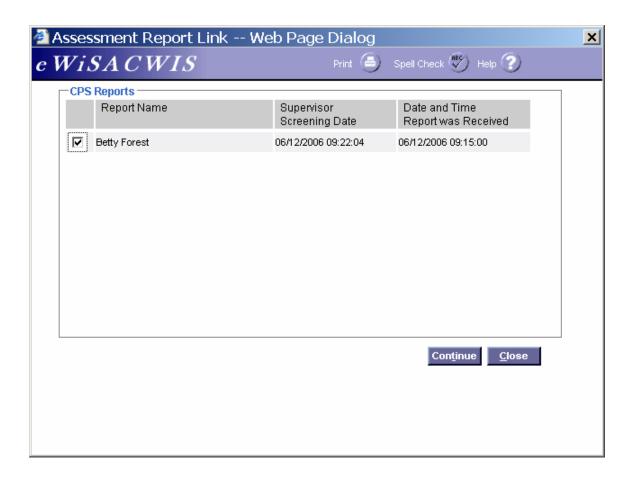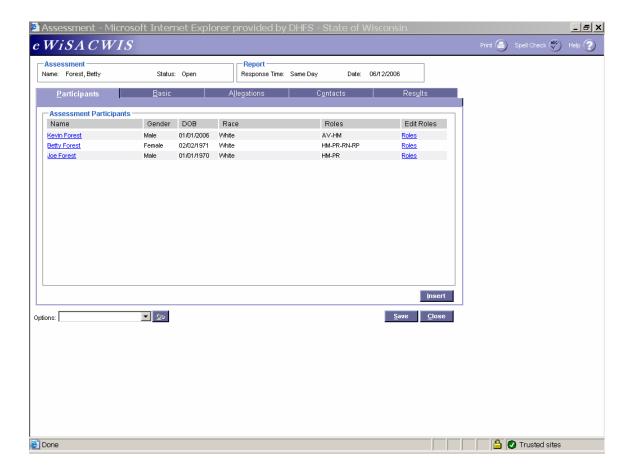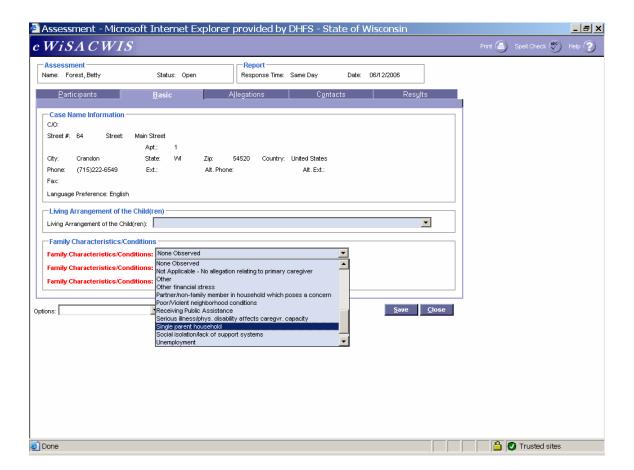# Initial Assessment Clinical – Primary Caregivers

1. From the desktop, go up to Create>Casework. From the Create Casework Page, select Assessment from the Assessment Icon and the family case. No participants are selected.

2. The next page will be the Assessment Report Link page. This page will show how many Protective Services and/or Services Intakes that need to be linked to an assessment. Select the check box for the report(s) that are to be linked to this assessment and click continue.

3. The Assessment and Report boxes at the top of the page will pre-fill with case name, case status, response time, and date. The remainder of the page consists of five tabs. The first tab is called the Participants tab. The Participants tab consists of demographic information that is carried over from the Intake. The participant's names are Hyperlinks. If individual information needs to be updated, click on their name and the system will open up the Person Management page for that individual (See Quick Reference Guide for Person Management). The Edit Roles Hyperlink will allow the case manager to edit the current roles for each individual. Finally, the insert button at the bottom of the page will allow additional participants to be added to the assessment. Click on insert and a Pop up message box will open with other participants listed on the Intake. Click the Radio button next to the individuals you want to add to the assessment and click continue (no screen shot).
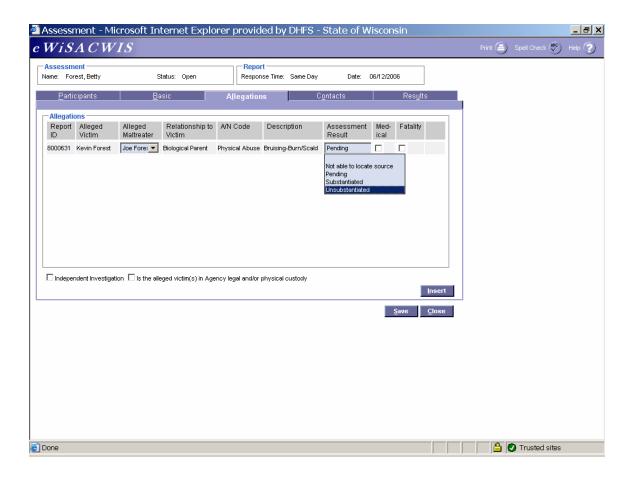
4. Click to the Basic tab. The Case Name Information Box will pre-fill with case demographics. The Living Arrangement of the Children Box is a drop down value. Select the appropriate value of the living arrangements of the children at the time of the assessment. Finally, the Family Characteristics consists of three drop down fields. Pick the values that best describe the family.
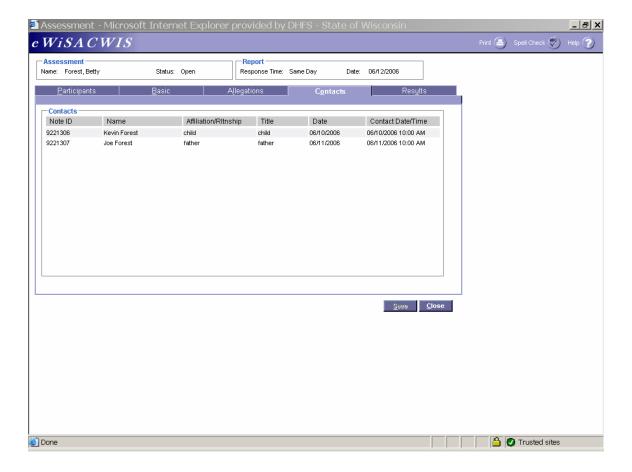
5. The Allegations Tab will pre-fill with the alleged victim and alleged maltreater. The abuse/neglect code and description will also pre-fill from the Intake. The relationship to the victim is a drop down value. Select the appropriate value for the case. The assessment result is also a drop down value. Select the appropriate value. The Medical check box refers to if the child received medical attention for the injury received from the abuse. The Fatality check box refers to if the child died due to neglect/abuse.

    The boxes below should be checked if the investigation is an Independent Investigation and/or the victim is legal or agency custody.

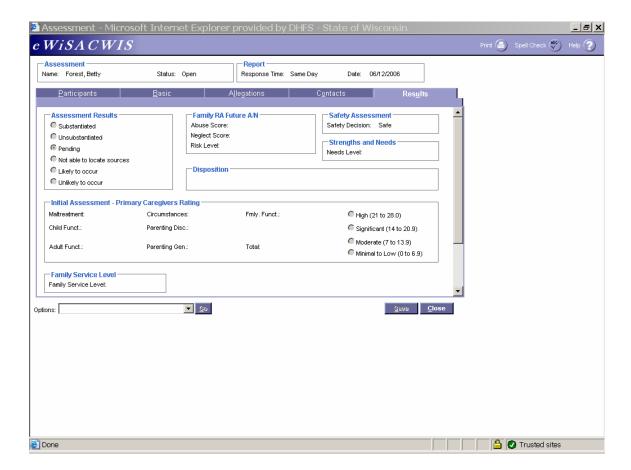   **NOTE: It is important to complete the Assessment Result prior to supervisory final approval. If the Assessment Result is in Pending Status, the assessment can not be approved.**

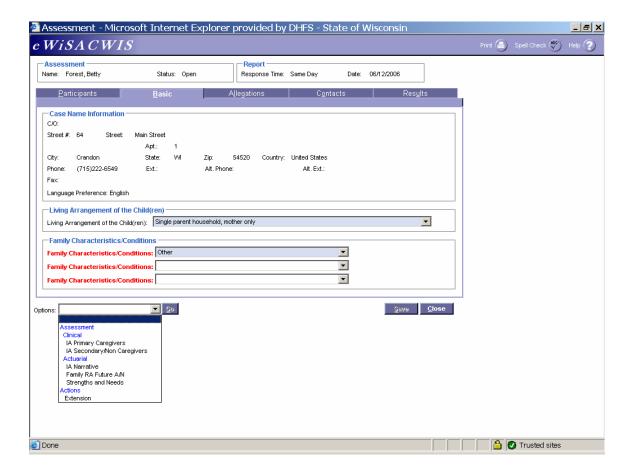6. Move to the Contacts Tab. This is a view only tab. The Contacts will pre-fill from contacts that were documented in the system. See Quick Reference Guide on how to create Assessment Contacts and Initial Face to Face Contact.
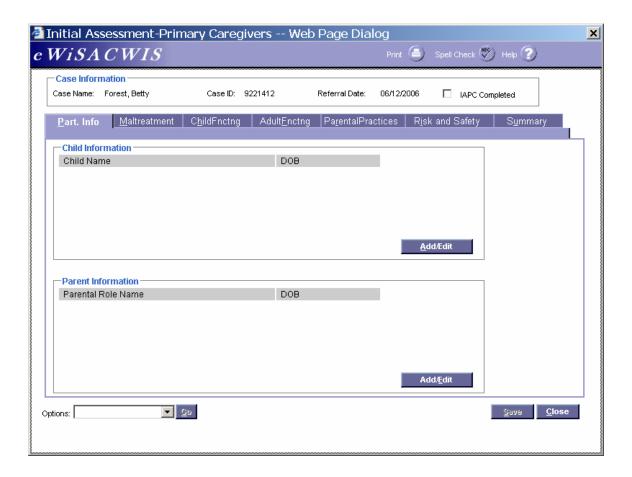
7. The last tab is the Results Tab. At this point, the Results Tab does not have much information that pre-filled. This tab is view only and will pre-fill from information documented in the IAPC.

8. Now, let's go back to the Basic Tab. Under Options, there are different selections for Assessment. For this example, we will use Clinical – IA Primary Caregiver. Click on the Go button.

9. The Initial Assessment Primary Caregivers Page will open. This page consists of eight tabs. The first tab is Participant Information. This page is blank and will require the case manager to add participants to the Child Information field and Parent Information field. Use the add/edit buttons on each box to add the participants to whom the assessment applies. The add/edit button will bring up a pop up page.

• **Note: In the Case Information Box is a check box labeled "IAPC Completed". This box must be checked prior to sending this off for final approval.**

10. Check off the box to the corresponding participant that should be added to the assessment for the Child Information and Parent Information group box and click continue.

11. The Participant Information is now pre-filled with the participants selected from the Case Participant pop-up box.

12. Next, click on to the Maltreatment tab. The first section of the Maltreatment Tab is the Safety Evaluation. The Safety Evaluation is built into the Initial Assessment. The Safety Evaluation is the same as the stand alone Safety Assessment.   The questions relate to the subject of the tab. The radio buttons default to blank. Read each question and respond to it appropriately. (see Safety Assessment Quick Reference Guide)

Next is the Maltreatment Box. Enter a narrative to describe the maltreatment and use the Maltreatment Rating box to rate it. There are drop down values which to select. Follow the same procedure for Surrounding Circumstances Accompanying or Leading up to Maltreatment.

Under Options, is the printable copy of the Initial Assessment. Select it, click Go and you will be able to read and print a copy.

Note: there is a scroll bar on the right of each tab. Use the scroll bar to scroll down to the bottom of the page in order to view the entire tab.

13. On the bottom of the page are two boxes. Each box consists of the Anchors (ratings) for each category above that a narrative was required. The Anchors will help determine how to rate each category.

14. Click on the expando to view the description for the corresponding number rating.

Initial Assessment-Primary Caregivers -- Web Page Dialog

eWiSACWIS   Print 🖨 Spell Check ✔ Help ❓

| Case Name: | Ash, Anna | Case ID: | 20238 | Referral Date: | 05/14/2004 |

Part. Info | **Maltreatment** | ChildFnctng | AdultFnctng | ParPractices | RiskRating | Safety | Support Net
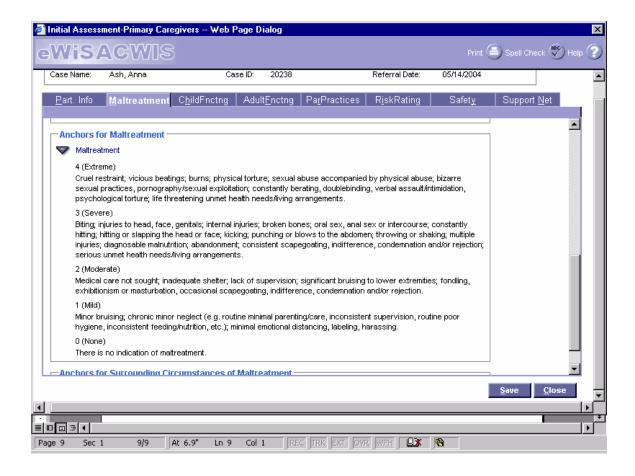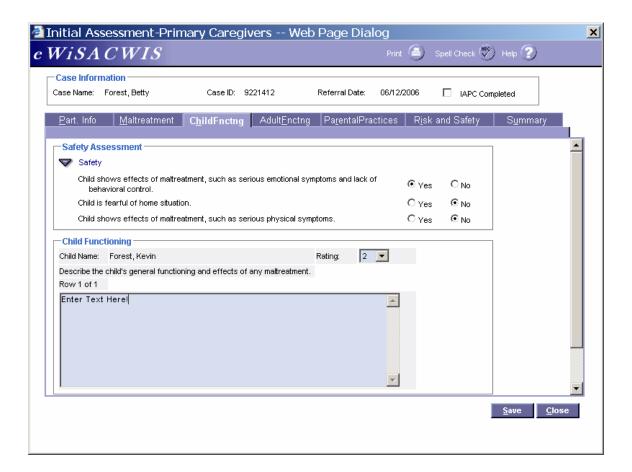
Anchors for Maltreatment

▼ Maltreatment

4 (Extreme)
Cruel restraint; vicious beatings; burns; physical torture; sexual abuse accompanied by physical abuse; bizarre sexual practices, pornography/sexual exploitation; constantly berating, doublebinding, verbal assault/intimidation, psychological torture; life threatening unmet health needs/living arrangements.

3 (Severe)
Biting; injuries to head, face, genitals; internal injuries; broken bones; oral sex, anal sex or intercourse; constantly hitting; hitting or slapping the head or face; kicking; punching or blows to the abdomen; throwing or shaking; multiple injuries; diagnosable malnutrition; abandonment; consistent scapegoating, indifference, condemnation and/or rejection; serious unmet health needs/living arrangements.

2 (Moderate)
Medical care not sought; inadequate shelter; lack of supervision; significant bruising to lower extremities; fondling, exhibitionism or masturbation, occasional scapegoating, indifference, condemnation and/or rejection.

1 (Mild)
Minor bruising; chronic minor neglect (e.g. routine minimal parenting/care, inconsistent supervision, routine poor hygiene, inconsistent feeding/nutrition, etc.); minimal emotional distancing, labeling, harassing.

0 (None)
There is no indication of maltreatment.

Anchors for Surrounding Circumstances of Maltreatment

Save   Close

Page 9   Sec 1   9/9   At 6.9"   Ln 9   Col 1   REC TRK EXT OVR WPH
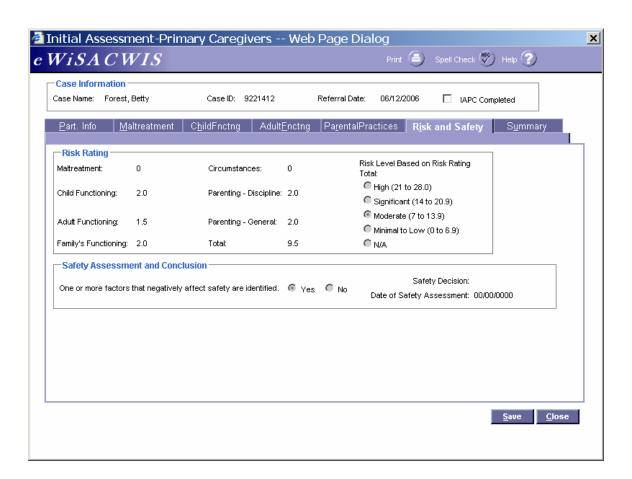
15. Let's continue to the Child Functioning Tab. The remaining tabs will work in the same manner as the Maltreatment Tab. There will be a Safety Evaluation, a Category in which a narrative will need to be entered, and a Rating of the Category. The only difference is that now the tabs will address all individuals who are a subject of this assessment. A narrative and risk rating will need to be done for each individual. Pay attention for additional scroll bars on the page. Also, above the narrative boxes will be "Row 1 of 2, Row 2 of 2, etc." This is a clue that there are more individuals that will need to be addressed.

16. After completing the Adult Functioning and Parenting Practices Tabs, click on the Risk and Safety Tab. The Risk and Safety Tab will calculate all of the Risk Ratings that were entered on the previous tabs. It will use the highest rating for each category. For example, if the mother was rated as a two for parenting practices and the father was rated a four, the system will use the father's score of four and ignore mother's score for the calculations for that category.
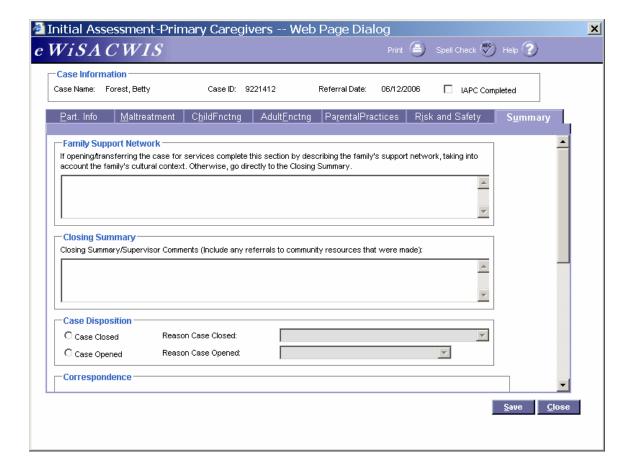
The Safety Assessment and Conclusion group box will identify if one or more safety threats have been identified. The Safety Decision and Date of Safety Assessment will not pre-fill until the Safety Assessment and Plan have been completed. This will be addressed later in this guide. (Bullet Point 19)
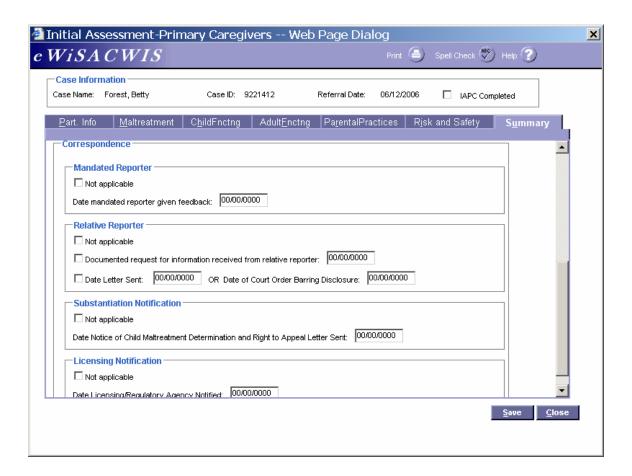
17. The Summary Tab has multiple group boxes; the first box is the Family Support Network. Use this box to document the family's support network if the case is to be opened for services.

The Closing Summary group box is to be used to document information that is pertinent to the case if the case is to be closed

The Case Disposition group box is to document if the case is to be opened or closed and the reason.
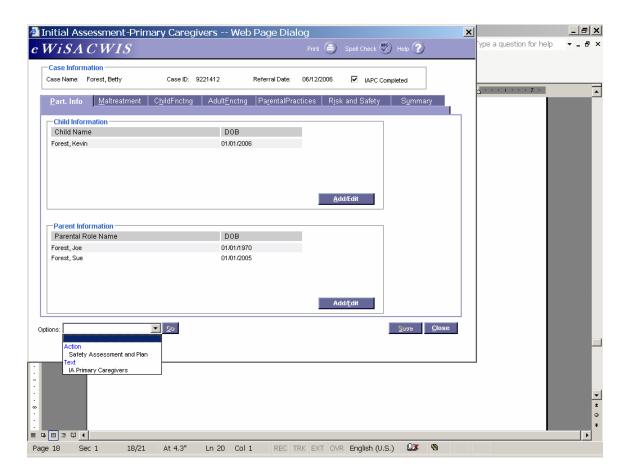
18. The final group box is the Correspondence group box. This is used to document if Mandated Reporters, Relative Reporters were notified. It also is used to document if a Substantiation Notification and a Licensing Notification was sent.

19. Based on the Safety Threats that were identified in the Initial Assessment, the Safety Assessment and Plan needs to be completed. The Safety Assessment and Plan can only be edited from the outliner. The Safety Assessment and Plan from Options on the Initial Assessment is view only.

The Text version of the IAPC can also be accessed from the Options menu.

Make sure the IAPC Completed checkbox is checked prior to final approval. This will approve the IAPC and Safety Assessment and Plan at the same time.

20. On the outliner, find the appropriate Safety Assessment and Plan (IAPC) and complete. See the Quick Reference Guide on Safety Assessment and Plan for instructions.

21. Once the Safety Assessment and Plan is completed, return to the Pending Initial Assessment on the outliner for final approval.